

77N: 49648
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RECEIVED

JUN 29 1984

District Director Of Internal Revenue
CHIEF, TECHNICAL STAFF
BALTIMORE

JUN 6 1984

OF: E.O. R. 4

National Committee to Preserve
Social Security and Medicare
1910 S Street, N. W.
Washington, D. C. 20002

Employer Identification Number: 52-1312579
City District: Baltimore
Accounting Period Ending: December
Foundation Status Classification: 509(a)(1) & 170(b)(1)(A)(vi)
Advance Ruling Period Ends: December 31, 1988

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code.

Because you are a newly created organization, we are not now making a final determination of your foundation status under Code section 509(a). However, we have determined that you can reasonably be expected to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during the advance ruling period. This advance ruling period begins on the date of your inception and ends on the date shown above.

Within 90 days after your advance ruling period ends, furnish your key District Director information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization or long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as such from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation until 90 dates after your advance ruling period ends. If you submit the required information within the 90 days, grantors and donors may continue to rely on the advance determination until we make a final determination of your foundation status. However, if notice that you will no longer be treated as a section 509(a)(1) organization is published

National Committee to Preserve Social Security and Medicare

In the Internal Revenue Bulletin, grantors and donors may not rely on this advance determination after the date of such publication. Also, a grantor or donor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

If your sources of support, or your purposes, character, or method of operation change, please let your key district know so that office can consider the effect on your exempt status and foundation status. Also, you should inform your key District Director of all changes in your name or address.

Generally, you are not required to pay social security (FICA) taxes unless you file a certificate electing coverage as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the certificate, you should contact your key District Director. You are not required to pay tax under the Federal Unemployment Tax Act (FUTA). Beginning January 1, 1984, unless specifically excepted, you must pay tax under the Federal Insurance Contributions Act (social security taxes) for each employee who is paid wages or rent in a calendar year.

Organizations that are not exempt organizations are not exempt from the excise taxes under Chapter 42 of the Code. However, you are not subject to the excise taxes under Chapter 42 of the Code if you are a corporation, partnership, or other federal entity. If you have questions about estate, employment, or other federal taxes, contact your Internal Revenue Service office.

Donors may deduct contributions made to you as provided in section 170 of the Code. Requests, requests, divisions, transfers, or gifts to you or for your use are deductible for federal income tax purposes if they meet the applicable provisions of sections 170, 172, and 173.

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. There is a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

National Committee to Preserve Social Security and Medicare

You are not required to file federal income tax returns unless you are subject to the tax on unearned business income under section 511. If you are subject to that tax, you must file an income tax return on Form 990, Exempt Organization Business Income Tax return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513.

Please show your employer identification number on all returns you file and in all correspondence with the Internal Revenue Service.

We are informing you of this ruling. Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions about this ruling, please contact the person whose name and telephone number are shown in the heading of this letter. For other matters, including questions concerning recording requirements, please contact your local district director.

Sincerely yours,

(Signed) J. E. Griffith

J. E. Griffith

Director, Internal Revenue Service

Washington, D.C.

cc: Mr. Griffith

Printed on request

cc: Mr. Griffith, Mr. Griffith

Form **872-C**
(Rev. July 1981)

Department of the Treasury—Internal Revenue Service

**Consent Fixing Period of Limitation
Upon Assessment of Tax Under Section
4940 of the Internal Revenue Code**
(See instruction 2 of Part IV—Form 1023 instructions.)

OMB No. 1545-0056
Expires May 31, 1984

To be used with Form
1023. Submit in
duplicate.

Under section 6501(c)(4) of the Internal Revenue Code, and as part of a request filed with Form 1023 that the organization named below be treated as a publicly supported organization under section 170(b)(1)(A)(vi) or section 509(a)(2) during an extended advance ruling period,

National Committee to Preserve Social
Security and Medicare

(Name of organization)

1910 S Street, N.W.
Washington, D.C. 20009

(Number, street, city or town, State, and ZIP code)

District Director

and the

Baltimore, Maryland

consent and agree that: (check one)

- ☐ If the first tax year in the extended advance ruling period is at least 8 months long, then the period for assessing tax (imposed under section 4940 of the Code) for any of the 5 tax years in the extended advance ruling period will extend 8 years, 4 months, and 15 days beyond the end of the first tax year.
- ☒ If the first tax year in the extended advance ruling period is less than 8 months long, then the period for assessing tax (imposed under section 4940 of the Code) for any of the 6 tax years in the extended advance ruling period will extend 9 years, 4 months, and 15 days beyond the end of the first tax year.

However, if a notice of deficiency in tax for any of these years is sent to the organization before the period expires, then the time for making an assessment will be further extended by the number of days the assessment is prohibited, plus 60 days.

Ending date of first tax year....December 31, 1983....

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CENTRALIZED SERVICES
BALTIMORE

Name of organization
National Committee to Preserve Social Security
and Medicare

Date

10/20/83

Officer or trustee having authority to sign

Signature ▶

District Director

Teddy R. Kern

Date

1/17/84

By ▶

Mary Ann Manager, EP/EO: 7204

For Paperwork Reduction Act Notice, see page 1 of the Form 1023 instructions.

Form **1023**
(Rev. July 1981)

Application for Recognition of Exemption

Under Section 501(c)(3) of the Internal Revenue Code

For Paperwork Reduction Act Notice, see page 1 of the instructions.

This application, when properly completed, constitutes the notice required under section 508(a) of the Internal Revenue Code so that an applicant may be treated as described in section 501(c)(3) of the Code, and the notice required under section 508(b) for an organization claiming not to be a private foundation within the meaning of section 509(a). (Read the instructions for each part carefully before making any entries.) The organization must have an organizing instrument (see Part II) before this application may be filed.

Part I—Identification

1 Full name of organization National Committee to Preserve Social Security and Medicare		2 Employer identification number (If none, attach Form SS-4) Form SS-4 attached
3(a) Address (number and street) 1910 S Street, N.W.		Check here if applying under section: <input type="checkbox"/> 501(e) <input type="checkbox"/> 501(f)
3(b) City or town, State, and ZIP code Washington, D.C. 20009	4 Name and phone number of person to be contacted William Wewer (202) 232-3170	
5 Month the annual accounting period ends December	6 Date incorporated or formed September 26, 1983	7 Activity codes 531 124 1430

8(a) Has the organization filed Federal income tax returns? ☐ Yes ☒ No
If "Yes," state the form number(s), year(s) filed, and Internal Revenue office where filed ▶

8(b) Has the organization filed exempt organization information returns? ☐ Yes ☒ No
If "Yes," state the form number(s), year(s) filed, and Internal Revenue office where filed ▶

Part II.—Type of Entity and Organizational Documents (see instructions)

Check the applicable entity box below and attach a conformed copy of the organization's organizing and operational documents as indicated for each entity.

☒ Corporation—Articles of incorporation, bylaws. ☐ Trust—Trust indenture. ☐ Other—Constitution or articles, bylaws.

Part III.—Activities and Operational Information

1 What are or will be the organization's sources of financial support? List in order of magnitude. If a part of the receipts is or will be derived from the earnings of patents, copyrights, or other assets (excluding stock, bonds, etc.), identify the item as a separate source of receipts. Attach representative copies of solicitations for financial support.

See attachment

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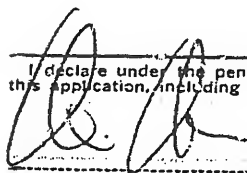
OCT 17 1983

CENTRALIZED SERVICES
BALTIMORE

2 Describe the organization's fund-raising program, both actual and planned, and explain to what extent it has been put into effect. (Include details of fund-raising activities such as selective mailings, formation of fund-raising committees, use of professional fund raisers, etc.)

See attachment

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and I have examined this application, including the accompanying statements, and to the best of my knowledge it is true, correct, and complete.



(Signature)

Director and General Counsel 10/2/83

(Title or authority of signer)

(Date)

William Wewer

Part III—Activities and Operational Information (Continued)

3. Give a narrative description of the activities presently carried on by the organization and those that will be carried on. If the organization is not fully operational, explain what stage of development its activities have reached, what further steps remain for the organization to become fully operational, and when such further steps will take place. The narrative should specifically identify the services performed or to be performed by the organization. (Do not state the purposes of the organization in general terms or repeat the language of the organizational documents.) If the organization is a school, hospital, or medical research organization, include enough information in your description to clearly show that the organization meets the definition of that particular activity that is contained in the instructions for Part VII-A.

See attachment

4. The membership of the organization's governing body is:

(a) Names, addresses, and duties of officers, directors, trustees, etc.

(b) Specialized knowledge, training, expertise, or particular qualifications

See attachment

National Committee to Preserve Social Security and Medicare
Attachment to Form 1023
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PART III(1) Organization Sources of Financial Support.

Substantially all of Applicant's financial support will come from small donations (\$10-\$50) from individuals.

PART III(2) Applicant's Fund Raising Program.

Applicant has been in existence for less than one month, and has not commenced its fund raising program. However, an affiliated organization to Applicant, National Committee to Preserve Social Security ("National Committee"), has been soliciting contributions since January. Applicant expects that its solicitations will be substantially similar to those of the National Committee, and an example of National Committee's solicitation is attached to this application. Applicant's fund raising program will be conducted almost exclusively by direct mail. Applicant expects to enter into a contract with a professional fund raiser, Butcher-Forde Consulting, which organization has managed fund raising for the National Committee. A copy of the proposed contract is attached.

PART III(3) Activities Carried on by Applicant.

Applicant is Affiliated with the National Committee to Preserve Social Security ("National Committee"), an organization which received its letter ruling from the Revenue Service on February 22, 1983, granting a tax exemption under Section 501(c)(4) of the Code. Upon Applicant's receipt of its letter ruling, National Committee intends to turn over most or all of its projects to Applicant. Therefore, Applicant's future activities will be substantially similar to those of the National Committee, except that Applicant will severely limit those of its activities which would tend to influence legislation.

National Committee to Preserve Social Security and Medicare
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PART III(3) (Continued)

Attached to this application is the unaudited income and expense statement of the affiliated National Committee. A review of these activities provides a strong indication of the general nature of the activities to be conducted by Applicant. These are broken out into four broad categories: education and research, legislative activities, solicitation costs, and administration.

Education and research. The majority of each dollar contributed (65%) has been spent for research and education activities, some of which are described here. On February 21, 1983, the National Committee staged a forum analyzing the Report of the National Commission on Social Security Reform. The speaker at that forum was Dr. Henry Aaron, an expert on Social Security matters presently in residence at the Brookings Institution in Washington, D.C. A transcript of Dr. Aaron's remarks is enclosed. Dr. Aaron not only discussed the impact of the National Commission's recommendations, but also gave a perceptive history of the problems which have emerged in recent years with Social Security funding. Dr. Aaron's remarks are available at no charge to those members of the public who were unable to attend the forum.

During Congressional consideration of the Social Security reform legislation in the spring of 1983, National Committee stationed its staff at committee hearings and chambers in the Senate and House to follow the debate. These staff members did not lobby the legislature; their only function was to follow and analyze the debate in Congress. A copy of the final report prepared by the Committee is enclosed. It consists of comments by noted observers from Social Security academia, etc., on the impact of the Social Security bill and the implications for the future. Earlier reports had analyzed the legislation itself. All these reports are available to the public at no charge.

National Committee to Preserve Social Security and Medicare
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PART III(3) (Continued)

National Committee has engaged in substantial mailings designed to bring the public's attention to the current status of Social Security and Medicare funding. Several million pieces were mailed during the first ten months of 1983. Some of these mailings included a "Request for Status of Social Security Account Form" which National Committee forwarded at no charge to the Social Security Administration. National Committee provided this service to every member of public who responded, whether or not they joined the National Committee.

National Committee has mailed newsletters and legislative alerts during 1983. Samples of these materials are enclosed. They are mailed to all members, and also are sent free of charge to any member of the public who requests them. Applicant recognizes that its printed material must conform to the restrictions on legislative activity established by Section 501 of the Code and Applicant's Articles of Incorporation and Bylaws.

This summer the nationally syndicated columnist "Dear Abby" published a column which stated that persons born during the so-called "notch years" of 1917 to 1921 will receive lower Social Security benefits than persons born either earlier or later. National Committee's legal staff researched the statute, and concluded that this representation was incorrect. Counsel to the National Committee coordinated with counsel to the Social Security Administration to prepare an exchange of letters between Chairman Roosevelt and the Associate Commissioner for Retirement and Survivors Insurance setting out the real facts. National Committee has been educating the public throughout the fall that persons born in the "notch years" will not receive fewer benefits than those born afterwards. Copies of the exchange of correspondence between Mr. Roosevelt and the Social Security Administration are enclosed.

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PART III(3) (Continued)

The Chairman of National Committee and Applicant, James Roosevelt, has made numerous speeches dealing with Social Security and Medicare at no charge during 1983. Expenses in connection with this volunteer speech activity do not appear on the expense statement.

Applicant is preparing a review of changes in Medicare regulations since 1980 with analysis of their impact on recipients. This study will be useful during the national debate which likely will occur when the President's commission on Medicare reform makes its report and recommendations on saving the financially-strapped Medicare system.

Solicitation. National Committee's second largest group of expenditures is the cost of solicitations. Of course, a new organization such as the National Committee must spend a disproportionately large amount of its first few years' budgets finding members upon whom it can depend for dues. Substantially all of the National Committee's solicitations for membership are made by direct mail appeals, and 22% of its first six months' expenditures were made in connection with these solicitations. Applicant expects that its cost of solicitation will be on the same order of magnitude as that of the affiliated National Committee.

Legislative Activities. The third largest category on National Committee's income expense statement is "legislative activities." The majority of the monetary expenditures that National Committee has made in connection with legislative work have been to collect petitions from its members and forward them to the Senate and House of Representatives. These petitions, a sample of which is enclosed, urge members of

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PART III(3) (Continued)

Congress to vote to preserve the existing Social Security and Medicare systems. During the spring of 1983, volunteer direct lobby work in connection with the Social Security reform legislation was done by a Washington lawyer who is a member of the National Committee. All of this effort was on a purely volunteer basis and was kept limited in scope. Periodically the National Committee sends a "Legislative Alert" to its members, urging them to contact their elected representatives directly in support of, or in opposition to pending legislation. National Committee has received copies of substantial correspondence that has been triggered by these appeals.

Applicant intends to elect under Section 501(h) of the Code as soon as it commences any legislative activities, probably early next year. Applicant is required by its Articles of Incorporation and Bylaws to keep its legislative activities restricted within the scope set out by Section 501(c)(3) of the Code. Applicant notes that the legislative activities of its affiliated organization, the National Committee, fall within the percentage limitations established by Section 4911 of the Code, and expects to have no difficulty keeping its own legislative activities below those of the National Committee.

Administrative. The remaining 2% of the National Committee's expenditures were in connection with office administration. The National Committee is pleased that its overhead has been kept to such a low proportion of contributions.

As the material submitted with this application demonstrates, Applicant will not be a narrow one-issue organization. It will deal with a broad range of social welfare issues that are of particular interest to persons who either are Social Security recipients or expect to participate in benefits from the Social Security system in the future. These

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PART III(3) (Continued)

activities include not only the narrow goal of legislative rescue of the Social Security and Medicare systems, but additionally such important issues as medical costs, out-patient care for the elderly, rest homes, taxation, and organized educational programs for the elderly.

This broad social conscience is exemplified by the Chairman of Applicant, James Roosevelt, who has a long history of aiding social welfare causes. Mr. Roosevelt served as a member of Congress from California for several terms, and then was appointed by President Johnson as a special delegate to the United Nations. When his father was President, he served as Secretary to the President, and was present during the early deliberations when the original Social Security System was created. Currently he is engaged in numerous philanthropic activities. He is a trustee to the March of Dimes' Birth Defects Foundation, on the Board of the National Conference of Christians and Jews, and serves as a Presidential appointee on the President's Commission on Executive Exchange. He is a trustee of Chapman College in California, and also is the Executive Director of that institution's Enterprise Institute. He is Vice President of the Eleanor Roosevelt Cancer Foundation, and is a Director of the South Coast Repertory Theatre. With his extensive background in philanthropic and educational activities, as well as his high level governmental experience, Mr. Roosevelt is uniquely situated to direct the activities of Applicant.

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PART III(4) Membership of the Organization's Governing Body.

James Roosevelt 120 Newport Center Drive Suite 200 Newport Beach, California 92660	Chairman of the Board of Directors	See attached biography
William Wewer, Esq. 1910 S Street, N.W. Washington, D.C. 20009	Director, Acting Executive Director, and General Counsel	Attorney at Law
Kathleen Marquardt 5600 Grove Street Chevy Chase, Maryland 20815	Director, Secretary, Treasurer	Ph.D. with extensive research background in medical care delivery. Executive Director of another exempt organization.
Blanch Kelly Kelly Consultants Suite A 18103 Sky Park South Irvine, California 92714	Assistant Treasurer	President of bookkeeping company which specializes in accounting for exempt organi- zations.

PART III(5) Affiliated Organization.

Applicant is affiliated with National Committee to Preserve Social Security, a District of Columbia nonprofit corporation which was granted federal tax exempt status under Section 501(c)(4) of the Code on February 22, 1983. Applicant is affiliated with National Committee by reason of its interlocking directorates.

Part III—Activities and Operational Information (Continued)

- 4 (c) Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? ☐ Yes ☒ No
If "Yes," name those persons and explain the basis of their selection or appointment.

- (d) Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons?" (See specific instruction 4(d).) ☐ Yes ☒ No
If "Yes," explain.

- (e) Have any members of the organization's governing body assigned income or assets to the organization? ☐ Yes ☒ No
If "Yes," attach a copy of assignment(s) and a list of items assigned.

- (f) Is it anticipated that any current or future member of the organization's governing body will assign income or assets to the organization? ☐ Yes ☒ No
If "Yes," explain fully on an attached sheet.

- 5 Does the organization control or is it controlled by any other organization? ☐ Yes ☒ No
Is the organization the outgrowth of another organization, or does it have a special relationship to another organization by reason of interlocking directorates or other factors? ☒ Yes ☐ No
If either of these questions is answered "Yes," explain.

See attachment

- 6 Is the organization financially accountable to any other organization? ☐ Yes ☒ No
If "Yes," explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been submitted.

- 7 (a) What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain their status, what additional steps remain to be completed, and when such final steps will be taken. Applicant has no assets.

- (b) To what extent have you used, or do you plan to use contributions as an endowment fund, i.e., hold contributions to produce income for the support of your exempt activities? None.

- 8 (a) What benefits, services, or products will the organization provide that are related to its exempt function?

See answer to III(3).

Part III.—Activities and Operational Information (Continued)

Page 4

- 8 (b) Have the recipients been required or will they be required to pay for the organization's benefits, services, or products? ☐ Yes ☒ No
If "Yes," explain and show how the charges are determined.

- 9 Does or will the organization limit its benefits, services, or products to specific classes of individuals? ☐ Yes ☒ No
If "Yes," explain how the recipients or beneficiaries are or will be selected.

- 10 Is the organization a membership organization? ☒ Yes ☐ No
If "Yes," complete the following:

- (a) Describe the organization's membership requirements and attach a schedule of membership fees and dues.

See attachment

- (b) Describe your present and proposed efforts to attract members, and attach a copy of any descriptive literature or promotional material used for this purpose.

See attachment

- (c) Are benefits, services, or products limited to members? ☐ Yes ☒ No
If "No," explain.

See attachment

- 11 Does or will the organization engage in activities tending to influence legislation or intervene in any way in political campaigns? ☒ Yes ☐ No
If "Yes," explain. (Note: You may wish to file Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation.)

See attachment

- 12 Does the organization have a pension plan for employees? ☐ Yes ☒ No

- 13 (a) Are you filing Form 1023 within 15 months from the end of the month in which you were created or formed as required by section 508(a) and the related Regulations? (See general instructions.) ☒ Yes ☐ No
(b) If you answer "No," to 13(a) and you claim that you fit an exception to the notice requirements under section 508(a), attach an explanation of your basis for the claimed exception.
(c) If you answer "No," to 13(a) and section 508(a) does apply to you, you may be eligible for relief under section 1.9100 of the Income Tax Regulations from the application of section 508(a). Do you wish to request relief? ☐ Yes ☐ No
(d) If you answer "Yes," to 13(c) attach a detailed statement that satisfies the requirements of Rev. Proc. 79-63.
(e) If you answer "No," to both 13(a) and 13(c) and section 508(a) does apply to you, your exemption can be recognized only from the date this application is filed with your key District Director. Therefore, do you want us to consider your application as a request for recognition of exemption from the date the application is received and not retroactively to the date you were formed? ☐ Yes ☐ No

Part IV.—Statement as to Private Foundation Status

- 1 Is the organization a private foundation? ☐ Yes ☒ No
2 If you answer "Yes," to question 1 and the organization claims to be a private operating foundation, check here ☐ and complete Part VIII.
3 If you answer "No," to question 1 indicate the type of ruling you are requesting regarding the organization's status under section 509 by checking the box(es) that apply below:
(a) Definitive ruling under section 509(a)(1), (2), (3), or (4) ☐ Complete Part VII.
(b) Advance ruling under section ☒ 170(b)(1)(A)(vi) or ☐ 509(a)(2)—see instructions.
(c) Extended advance ruling under section ☒ 170(b)(1)(A)(vi) or ☐ 509(a)(2)—see instructions.
(Note: If you want an extended advance ruling you must check the appropriate boxes for both 3(b) and 3(c).)

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Attachment to Form 1023
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PART III(10) Membership Information.

(a) Applicant's membership requirements are set out at Article III of its By-laws (enclosed). Any individual who subscribes to the purposes of Applicant may become a member of Applicant upon payment of dues, which are \$10 for an individual membership and \$12.50 for a family membership. Membership in Applicant is available without regard to race, color, creed, or national origin.

(b) Substantially all of Applicant's efforts to attract members will be by direct mail. Sample solicitation pieces by Applicant's affiliated organization, the National Committee, are attached.

(c) Applicant's educational materials are made available to the public at no charge.

PART III(11) Legislative Activity.

(a) Applicant and its affiliated organization expect to spend a limited portion of their budgets attempting to influence legislation relating to Social Security and Medicare. These expenditures will be kept strictly within the bounds set by Section 4911 of the Code. During its first six months, the National Committee's total expenditures in connection with legislation were 11% of total expenditures (see attached budget). Applicant will not intervene, directly or indirectly, in political campaigns on behalf of, or in opposition to, any candidate for public office, and is prohibited from doing so by its Articles of Incorporation and Bylaws.

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PART IV Financial Data

Attached to this application is the audited financial statement of National Committee for its short first fiscal year (1982), and the unaudited statement of income and expenses for the first six months of 1983. Applicant's budget will be substantially similar to that of National Committee. A proposed budget covering fiscal years 1984 and 1985 follows.

<u>INCOME</u>	1984	1985
Membership dues	\$1,250,000	\$1,800,000
Other donations	<u>100,000</u>	<u>250,000</u>
TOTAL INCOME	\$1,350,000	\$2,050,000
<u>EXPENSES</u>		
Research and Education		
Research Expenses	\$ 280,000	\$ 550,000
Preparing educational materials	350,000	525,000
Distribution costs	150,000	200,000
Forums, speeches, etc.	<u>55,000</u>	<u>100,000</u>
Total Research and Education	\$1,350,000 62%	\$1,375,000 67%
Legislative Activities		
Grass roots lobby activities	\$ 35,000	\$ 45,000
Legislative alerts to members	110,000	180,000
Other direct lobby expenditures	<u>30,000</u>	<u>45,000</u>
Total Legislative Activities	\$175,000 13%	\$270,000 13%

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PART IV Financial Data (Continued)

	1984		1985	
Solicitation Costs				
Printing solicitation materials	\$180,000		\$205,000	
Postage	75,000		100,000	
Total Solicitation Costs	<u>\$255,000</u>	19%	<u>\$305,000</u>	15%
Administration				
Office expense	\$ 15,000		\$ 15,000	
Office supplies	3,000		4,000	
Staff salaries	27,000		35,000	
Administrative travel	5,000		6,000	
Legal and accounting	<u>35,000</u>		<u>40,000</u>	
Total Administration	\$85,000	6%	\$100,000	5%
TOTAL EXPENSES	\$1,350,000		\$2,050,000	

Statement of Support, Revenue, and Expenses for period ending See attachment 19

Support and Revenue	1	Gross contributions, gifts, grants, and similar amounts received	1	
	2	Gross dues and assessments of members	2	
	3	(a) Gross amounts derived from activities related to organization's exempt purpose	3	
		(b) Minus cost of sales		
	4	(a) Gross amounts from unrelated business activities	4	
		(b) Minus cost of sales		
	5	(a) Gross amount received from sale of assets, excluding inventory items (attach schedule)	5	
	(b) Minus cost or other basis and sales expenses of assets sold	6		
	6	Investment income (see instructions)	7	
	7	Total support and revenue	7	
Expenses	8	Fund raising expenses	8	
	9	Contributions, gifts, grants, and similar amounts paid (attach schedule)	9	
	10	Disbursements to or for benefit of members (attach schedule)	10	
	11	Compensation of officers, directors, and trustees (attach schedule)	11	
	12	Other salaries and wages	12	
	13	Interest	13	
	14	Rent	14	
	15	Depreciation and depletion	15	
	16	Other (attach schedule)	16	
	17	Total expenses	17	
	18	Excess of support and revenue over expenses (line 7 minus line 17)	18	

Balance Sheets		Enter dates	Beginning date	Ending date
Assets				
19	Cash (a) Interest bearing accounts	19		
	(b) Other	20		
20	Accounts receivable, net	21		
21	Inventories	22		
22	Bonds and notes (attach schedule)	23		
23	Corporate stocks (attach schedule)	24		
24	Mortgage loans (attach schedule)	25		
25	Other investments (attach schedule)	26		
26	Depreciable and depletable assets (attach schedule)	27		
27	Land	28		
28	Other assets (attach schedule)	29		
29	Total assets			
Liabilities				
30	Accounts payable	30		
31	Contributions, gifts, grants, etc., payable	31		
32	Mortgages and notes payable (attach schedule)	32		
33	Other liabilities (attach schedules)	33		
34	Total liabilities	34		
Fund Balances or Net Worth				
35	Total fund balances or net worth	35		
36	Total liabilities and fund balances or net worth (line 34 plus line 35)	36		

Has there been any substantial change in any aspect of your financial activities since the period ending date shown above? ☐ Yes ☐ No

If "Yes," attach a detailed explanation.

Part VI.—Required Schedules for Special Activities

	If "Yes," check here;	And, complete schedule—
1 Is the organization, or any part of it, a school?		A
2 Does the organization provide or administer any scholarship benefits, student aid, etc.?		B
3 Has the organization taken over, or will it take over, the facilities of a "for profit" institution?		C
4 Is the organization, or any part of it, a hospital or a medical research organization?		D
5 Is the organization, or any part of it, a home for the aged?		E
6 Is the organization, or any part of it, a litigating organization (public interest law firm or similar organization)?		F
7 Is the organization, or any part of it, formed to promote amateur sports competition?		G

Part VII—Non-Private Foundation Status (Definitive ruling only)**A.—Basis for Non-Private Foundation Status**

The organization is not a private foundation because it qualifies as:

	Kind of organization	Within the meaning of	
1	a church	Sections 509(a)(1) and 170(b)(1)(A)(i)	
2	a school	Sections 509(a)(1) and 170(b)(1)(A)(ii)	
3	a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)	
4	a medical research organization operated in conjunction with a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)	
5	being organized and operated exclusively for testing for public safety	Section 509(a)(4)	
6	being operated for the benefit of a college or university which is owned or operated by a governmental unit	Sections 509(a)(1) and 170(b)(1)(A)(iv)	Part VII.—B
7	normally receiving a substantial part of its support from a governmental unit or from the general public	Sections 509(a)(1) and 170(b)(1)(A)(v)	Part VII.—B
8	normally receiving not more than one-third of its support from gross investment income and more than one-third of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions)	Section 509(a)(2)	Part VII.—B
9	being operated solely for the benefit of or in connection with one or more of the organizations described in 1 through 4, or 6, 7, and 8 above	Section 509(a)(3)	Part VII.—C

B.—Analysis of Financial Support

	(a) Most recent tax year	(Years next preceding most recent tax year)			(e) Total
	19.....	(b) 19.....	(c) 19.....	(d) 19.....	
1 Gifts, grants, and contributions received					
2 Membership fees received					
3 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity which is not an unrelated business within the meaning of section 513					
4 Gross investment income (see instructions for definition)					
5 Net income from organization's unrelated business activities not included on line 4					
6 Tax revenues levied for and either paid to or spent on behalf of the organization					
7 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge)					
8 Other income (not including gain or loss from sale of capital assets)—attach schedule					
9 Total of lines 1 through 8					
10 Line 9 minus line 3					
11 Enter 2% of line 10, column (e) only					

12 If the organization has received any unusual grants during any of the above tax years, attach a list for each year showing the name of the contributor, the date and amount of grant, and a brief description of the nature of such grant. Do not include such grants on line 1 above—(See instructions).

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY

FINANCIAL STATEMENTS

OCTOBER 15, 1982 TO DECEMBER 31, 1982

JOSEPH RANSOM ACCOUNTANCY CORPORATION

CERTIFIED PUBLIC ACCOUNTANT

JOSEPH RANSOM ACCOUNTANCY CORPORATION


CERTIFIED PUBLIC ACCOUNTANT
2101 BUSINESS CENTER DRIVE, SUITE 100
IRVINE, CALIFORNIA 92715
(714) 833-1040

The Board of Directors
National Committee to Preserve Social Security:

I have made a review of the balance sheet of the National Committee to Preserve Social Security as of December 31, 1982, and the related statements of revenue, expenses, changes in fund balances and changes in financial position for the period of October 15, 1982 to December 31, 1982, in accordance with standards established by the American Institute of Certified Public Accountants.

A review of interim financial information consists principally of obtaining an understanding of the system for the preparation of interim financial information, applying analytical review procedures to financial data, and making inquiries of persons responsible for financial and accounting matters. It is substantially less in scope than an examination in accordance with generally accepted auditing standards, the objective of which is the expression of an opinion regarding the financial statements taken as a whole. Accordingly, I do not express such an opinion.

Based on my review, I am not aware of any material modifications that should be made to the accompanying financial statements for them to be in conformity with generally accepted accounting principles.



JOSEPH RANSOM, CPA

January 14, 1983

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
BALANCE SHEET
DECEMBER 31, 1982

ASSETS:

Current Assets:	
Prepaid postage	\$ 18,720
Other Assets:	
Organization costs	<u>2,500</u>
	\$ 21,220
	=====

LIABILITIES AND FUND BALANCE

Current Liabilities:	
Accounts payable	38,290
Fund balance <deficit>	<u><17,070></u>
Total Liabilities and Fund balances	\$ 21,220
	=====

See Accountants Review Report.

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
STATEMENT OF REVENUE, EXPENSES AND CHANGES IN FUND BALANCES
FROM OCTOBER 15, 1982 TO DECEMBER 31, 1982

Revenue:	
Contributions	\$ -0-
Expenses:	
Consulting	4,000
List rentals	12,861
Telephone	<u>209</u>
Total Expenses	17,070
Excess <Expenses> over Revenue	<17,070>
Fund Balance, Beginning	-0-
Fund Balance <Deficit>, Ending	\$<17,070> =====

See Accountants Review Report.

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
STATEMENT OF CHANGES IN FINANCIAL POSITION
OCTOBER 15, 1982 TO DECEMBER 31, 1982

Source of Funds

Excess of revenue over expenses \$<17,070>

Application of Funds

Increase in Organization cost 2,500

Decrease in Working Capital

\$<19,570>
=====

Changes in Components of Working Capital:

Increase <decrease> in current assets:

Prepaid postal 18,720

Increase <decrease> in current liabilities:

Accounts payable 38,290

<Decrease> in Working Capital

\$<19,570>
=====

See Accountants Review Report.

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY

NOTES TO FINANCIAL STATEMENTS

NOTE (1) Summary of Significant Accounting Policies

(A) Description of Organization

The National Committee to Preserve Social Security was organized as a non-profit organization on October 15, 1982 for the purpose of bringing about civic betterment and social improvement, and promoting the common good and general welfare of the people of the community by supporting the continuation of the American Social Security System and working to maintain the integrity of the Federal Old Age and Survivors Trust Fund; and educating the public on subjects beneficial to the community, including the importance of America's Social Security System. The committee was incorporated pursuant to the District of Columbia Non-Profit Corporation Act on November 18, 1982.

(B) Basis of Accounting

The accompanying Financial Statement have been prepared on the accrual method of accounting as prescribed by American Institute of Certified Public Accountants - Statement of Position 78-10 for "Accounting Principles and Reporting Practices for Certain Non-Profit Organizations."

NOTE (2) Income Taxes

The committee has applied to the Internal Revenue Service for exemption from federal income taxes under Section 501 (c)(4) of the Internal Revenue Code of 1954, as amended, and have similarly applied to the District of Columbia government for exemption from their income taxes.

NOTE (3) Contingencies

On November 1, 1982 the Committee engaged Butcher Forde Consulting to provide the services of consulting, production, management, procurement and other necessary and related services in connection with all of Committee's activities relating to public relations, direct mail campaigns and solicitations and media activities.

DEPARTMENT OF CONSUMER AND REGULATORY AFFAIRS
Corporation Division
515 D Streets, N. W.
Washington, D. C. 20001

CERTIFICATE

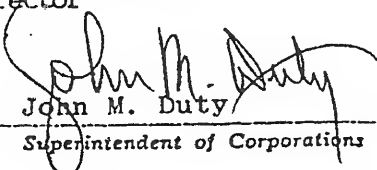
THIS IS TO CERTIFY that all provisions of the District of Columbia Non-profit Corporation Act have been complied with and ACCORDINGLY this Certificate of Incorporation

is hereby issued to the NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY AND
MEDICARE

as of the date hereinafter mentioned.

Date September 26, 1983

Carol B. Thompson
Director


John M. Duty

Superintendent of Corporations

**ARTICLES OF INCORPORATION
OF
NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
AND MEDICARE**

To: The Recorder of Deeds, D.C.
Washington, D.C.

We, the undersigned natural persons of the age of twenty-one years or more, acting as incorporators of a corporation, adopt the following Articles of Incorporation for such corporation pursuant to the District of Columbia Nonprofit Corporation Act:


FIRST: The name of the corporation is:

**NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
AND MEDICARE**

SECOND: The period of duration is perpetual.

THIRD: The corporation is organized, and shall be operated, not for profit, but exclusively for the promotion of the public interest by means of charitable and educational activities within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1954, as amended. In furtherance of this objective, the corporation shall have the following purposes:

(a) The corporation shall be operated for charitable purposes including the defense of human and civil rights secured by law, including the defense of America's Social Security and Medicare systems. In carrying out this purpose the corporation may advocate social or civic changes within the limits set out in paragraph (d) of this Article

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BY 

and the regulations established for organizations operating under Section 501(c)(3) of the Internal Revenue Code.

(b) The corporation shall educate the public on subjects useful to the individual and beneficial to the community, including the importance of America's Social Security and Medicare systems. The corporation shall present its educational programs by means of publications, conferences, public discussion groups, forums, panels, lectures and similar activities.

(c) The corporation shall have and exercise all rights and powers conferred on nonprofit corporations under the Nonprofit Corporation Act, including the power to contract, rent, buy, or sell personal or real property; provided, however, that the corporation shall not engage, other than as an insubstantial part of its activities, in any activities or exercise any powers that are not in furtherance of the primary purposes of the corporation.

(d) Notwithstanding anything in the foregoing, no part of the net earnings or assets of the corporation shall inure to the benefit of any director, officer, member of the corporation, or other private individual; no substantial part of the activities of the corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation; and the corporation shall not participate or intervene in any political campaign (including the publishing or distributing of statements) on behalf of any candidate for public office.

FOURTH: The corporation shall be a membership organization.

FIFTH: The corporation is to be divided into six classes of members. The designation of each class of members, and the qualifications and rights of the members of each class as regards conferring, limiting, or denying the right to vote, shall be provided in the Bylaws of the corporation.

SIXTH: The manner in which directors shall be elected or appointed shall be provided in the Bylaws of the corporation.

SEVENTH: Provisions for the regulation of the internal affairs of the corporation shall be provided in the Bylaws of the corporation. Upon dissolution or final liquidation of the corporation, all assets remaining after application and distribution of assets as required under Section 29-549 of the Nonprofit Corporation Act shall be transferred or conveyed to one or more domestic or foreign corporations, societies, or organizations which have qualified for nonprofit and tax exempt status under Section 501(c)(3) of the Internal Revenue Code, and which are engaged in activities substantially similar to those of the corporation, pursuant to a plan of distribution adopted as provided for in Section 29-550 of the Nonprofit Corporation Act.

EIGHTH: The address, including street and number, of the corporation's initial registered office is 1910 S Street, N.W., Washington, D.C. 20009, and the name of its initial registered agent at such address is William Wewer.

NINTH: The number of directors constituting the initial Board of Directors is three, and the names and addresses of the persons who are to serve as the initial directors until the first annual meeting or until their successors be elected and qualified are:


James Roosevelt	120 Newport Center Drive Suite 200 Newport Beach, California 92660
William Wewer	1910 S Street, N.W. Washington, D.C. 20009
Kathleen Marquardt	1910 S Street, N.W. Washington, D.C. 20009

TENTH: The name and address of each incorporator is:

Kathleen Marquardt 1910 S Street, N.W.
Washington, D.C. 20009

Ileana Francis 1910 S Street, N.W.
Washington, D.C. 20009

Jacqueline Hawkins 1910 S Street, N.W.
Washington, D.C. 20009


Kathleen Marquardt


Ileana Francis


Jacqueline Hawkins

Dated September 23, 1983

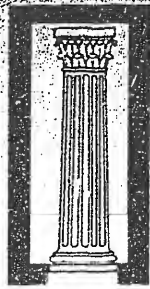
CITY OF WASHINGTON :
: SS
DISTRICT OF COLUMBIA :

I, William Wewer, a Notary Public, hereby certify that on the 23rd day of September, 1983, personally appeared before me Kathleen Marquardt, Ileana Francis, and Jacqueline Hawkins, who signed the foregoing documents as incorporators.

Witness my hand and Notarial Seal.


Notary Public

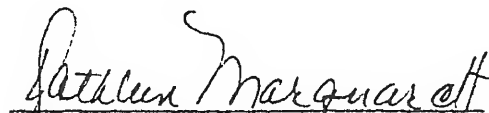
My Commission Expires 12/14/1987



**NATIONAL COMMITTEE TO
PRESERVE SOCIAL SECURITY**

1910 S Street N.W., Washington, D.C. 20009

The attached is a conformed copy of the Bylaws of National Committee to Preserve Social Security and Medicare, as adopted at the organizational meeting of that Committee, held at Washington, D.C. on October 18, 1983.


Kathleen Marquardt, Secretary

CORPORATE SEAL

**BYLAWS
OF
NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
AND MEDICARE**

Article I
NAME AND LOCATION

Section 1. Name. The name of this organization shall be **NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY AND MEDICARE** (the "Committee"), a nonprofit corporation incorporated in the District of Columbia.

Section 2. Location. Office of the Committee shall be located in the District of Columbia, and in such other localities as may be determined by the Board of Directors.

Article II
PURPOSES

Section 1. Purposes. The purposes of the Committee shall be:

- (A) To promote charitable goals, including the defense of human and civil rights secured by law, with particular attention to the defense of America's Social Security and Medicare systems.
- (B) To educate the public on subjects useful to the individual and beneficial to the community, including the importance of America's Social Security and Medicare systems.
- (C) To present its educational programs by means of publications, conferences, public discussion groups, forums, panels, lectures, and similar activities.

Section 2. Restrictions on Activities. The Committee shall conduct all its activities within the restrictions established by Section 501(c)(3) of the Internal Revenue Code of 1954, as amended, and the Regulations relating thereto, as issued by the

Department of the Treasury. No part of the net earnings or assets of the Committee shall inure to the benefit of any director, officer, member of the Committee, or other private individual or corporation established for profit. No substantial part of the activities of the Committee shall consist of the carrying on of propaganda, or otherwise attending to influence legislation. The Committee shall not participate or intervene in any political campaign (including the publishing or distribution of statements) on behalf of or in opposition to any candidate for public office.

Article III MEMBERSHIP

Section 1. Qualifications. Any individual who subscribes to the purposes of the Committee may become a member of the Committee subject only to compliance with the provisions of these Bylaws. Membership in the Committee shall be available without regard to race, color, creed, or national origin.

Section 2. Voting Membership. Members shall be designated Voting Members only by a majority vote of the Board of Directors or by a majority vote of the Voting Members at a meeting of the Voting Members. Voting Members shall have the exclusive right to vote for the election of members of the Board of Directors and on all other matters. Each Voting Member shall have one vote. Until such time as there are a minimum of 25 Voting Members, successor Directors shall be elected by majority vote of the standing Board of Directors.

Section 3. Non-Voting Membership. The following membership classes shall have no vote:

- (A) Regular Membership. Members shall become Regular Members upon the payment of dues to be established by the Board of Directors. Regular Members shall have the right to receive the Committee's newsletter, to make their views known to the Board of Directors by means of special membership polls, to

participate in conventions and other activities of the Regular Members, and any other rights granted to them by the Board of Directors.

(B) Affiliate Membership. All other members of the Committee shall be Affiliate Members.

Section 4. Reserved Classes. The Board may authorize such other membership classes as it may determine from time to time.

Section 5. Suspension and Expulsion. For cause, any membership may be suspended or terminated. Sufficient cause for such suspension or termination of membership shall be violation of the Bylaws or any agreement, rule or practice properly adopted by the Committee, or any other conduct contrary to the interests of the Committee. Such suspension or expulsion shall be by two-thirds vote of the Board of Directors; provided, however, that a statement of the charges shall have been forwarded by Certified Mail to the last recorded address of the member at least fifteen days before final action is taken. This statement shall be accompanied by a notice of the time and place of the meeting of the Board of Directors at which the charges shall be considered and the respective member shall have the opportunity to appear in person or by his representative and present any defense to such charges before action is taken.

Section 6. Forfeiture of Membership. Any member whose dues or assessment have not been paid within sixty (60) days from the date upon which they become due shall automatically forfeit his membership in the Committee. Any member who shall forfeit membership by operation of this clause may apply for reinstatement to membership provided such application is accompanied by payment of all dues in arrears as of the date of forfeiture and for all dues that would have been due and payable during the period between such forfeiture and the date of application for reinstatement.

Section 7. Resignation. Any member may resign by filing a written resignation with the Executive Director, but such resignation shall not relieve the member so resigning of the obligation to pay any dues, or other charges theretofore accrued and unpaid.

Article IV
MEETINGS OF VOTING MEMBERS

Section 1. Annual Meeting. The Board of Directors shall establish a time and place for the annual meeting of the Voting Members of the Committee.

Section 2. Special Meetings. Special meetings of the Voting Members shall be held from time to time and at such place as deemed advisable by the Board of Directors.

Section 3. Notice of Meetings. Notice of every meeting of Voting Members shall be given either personally or by mailing such notice, postage prepaid, to Voting Members at their addresses as carried on the books of the Committee, not less than fifteen (15) days prior to the date of the meeting.

No notice of the time, place or purpose of any meeting of Voting Members need be given to any Voting Member who executes and files written waiver of such notice either before or after the holding of such meeting, or who signifies his waiver by attending the meeting.

Section 4. Quorum. A quorum at any meeting of Voting Members shall require the presence in person or by proxy of twenty-five percent (25%) of the Voting Members of the Committee.

Section 5. Voting. Voting may be in person or by written proxy subscribed by such Voting Member or his duly authorized attorney. No proxy that is dated more

than eleven months before the meeting at which it is offered shall be accepted, unless such proxy shall, on its face, name a longer period for which it is to remain in force.

Unless otherwise provided by applicable law, regulation, the Articles of Incorporation or these Bylaws, all questions submitted to the Voting Members shall be decided by a majority of the votes cast at a duly constituted meeting.

Section 6. Conduct of Meeting. The meetings of the Voting Members shall be presided over by the Chairman of the Board of Directors, or if he shall not be present, by a chairman to be elected at the meeting. The Secretary of the Committee, if present, shall act as secretary of such meetings, or if he is not present, then a secretary shall be elected at the meeting.

Section 7. Actions Without Meeting. The provisions of this or any other article notwithstanding, any action required or permitted to be taken at a meeting of Voting Members or by vote of the Voting Members may be taken without a meeting upon the written consent, specifying the action to be taken, of a simple majority of the Voting Members.

Article V BOARD OF DIRECTORS

Section 1. Authority and Responsibility. The governing body of the Committee shall be the Board of Directors. The Board of Directors shall have supervision, control and direction of the affairs of the Committee; shall designate Voting Members of the Committee; shall actively prosecute the Committee's objectives; and shall supervise the disbursement of the Committee's funds. The Board may adopt such rules and regulations for the conduct of its business as shall be deemed advisable, and may, in the execution of the powers granted, delegate certain of its authority and responsibility to one or more committees.

Section 2. Number and Tenure of Office. The Board of Directors shall consist of no less than three (3) nor more than nine (9) Directors. Each Director shall hold office for three years or until his successor is duly elected and qualifies. Terms of Directors shall not be coterminous. Directors need not be Voting Members.

Section 3. Manner of Election. At the organizational meeting of the Committee, the Directors shall select terms by lot, one of which shall be a term of one year, one a term of two years, and one a term of three years. Thereafter, at each annual meeting of the Voting Members, or Board of Directors if there are not yet 25 Voting Members, a number of Directors equal to that of those whose terms have expired shall be elected for the term of three years. Such election shall be by a majority of the Voting Members present and voting where applicable, or, where applicable, of the Directors whose terms have not expired and who are present and voting. Any Director may be re-elected at the expiration of this term of office. If the size of the Board is increased, one-third of the additional Directors shall serve initial terms of one year, one-third shall serve initial terms of two years, and one-third shall serve three year terms.

Section 4. Place and Manner of Meeting; Action Without Meeting. Annual and regular meetings of the Board of Directors may be held at such place and time as the Directors may determine. Special meetings of the Board of Directors may be held from time to time upon call of the Executive Director, Chairman of the Board, or a majority of the Directors. Members of the Board of Directors may act by means of conference telephone network or similar communication methods by which all persons participating in the meeting can hear such other, and without meetings by unanimous written consent to such action signed by all Directors and filed with the Minutes of the Board.

Section 5. Notice of Meeting. Written or printed notice of every annual and regular meeting of the Board of Directors, stating the place, day, and hour of the meeting shall be given either personally or by mail to Directors not less than ten (10) nor more than fifty (50) days prior to the date of the meeting. Notice of the time and place of a special meeting shall be served upon or telephoned to each Director at least seventy-two (72) hours, or mailed or telegraphed to each Director at least ninety-six (96)

hours, prior to the time of the meeting. No notice need be given to any Director who actually attends, or who executes and files written waiver of notice of such meeting, either before or after the meeting.

Section 6. Quorum. A majority of the members of the Board of Directors shall constitute a quorum at such meetings. No vote shall be taken unless a quorum is present. The vote of a majority of those present at a meeting at which a quorum is present shall be sufficient to constitute action of the Board of Directors except for actions for which a greater vote may be required by statute, the Articles of Incorporation or these Bylaws.

Section 7. Chairman of the Board. The Board of Directors may, by majority vote of the entire Board, appoint from the Directors a Chairman and Vice-Chairman. The Chairman shall preside at all meetings of the Board of Directors and at all annual and special meeting of the Voting Members, and shall have such other duties as the Board shall determine. The Vice-Chairman may act as chairman, in the absence of the Chairman.

Section 8. Compensation of Directors. Directors may receive reasonable compensation from the Committee for services rendered to the Committee affecting one or more of its purposes. Directors may be reimbursed for any reasonable expenses incurred by them in the execution of their official duties, including travel expenses.

Section 9. Voting. At all meetings of the Board of Directors, each Director shall have one vote.

Section 10. Vacancies. The Board of Directors, by majority vote, is empowered to appoint temporary Directors to fill any vacancies on the Board caused by death, resignation, or otherwise; such temporary Directors shall serve until the next annual meeting of the Committee.

Section 11. Removal of Directors. Any Director may be removed for cause by vote of two-thirds (2/3) of either the entire Board or the entire Voting Membership.

Section 12. Resignation. Any Director may resign from the Board by giving written notice to the Chairman of the Board. Such resignation shall be effective upon receipt of notice by the Chairman or at such later date as specified in the notice.

Section 13. Executive Committee. The Board of Directors may appoint from among its members an Executive Committee of not less than two nor more than five members, one of whom shall be the Chairman of the Board, and shall designate one of such members as its Chairman. The term of the Executive Committee shall be one year. The Executive Committee shall possess and may exercise all the powers of the Board of Directors between meetings of the Board. In general, the Executive Committee shall be responsible for the coordination, planning, and administration of all Committee activities and for such other specific duties as may from time to time be assigned to it by the Board of Directors. The Executive Committee shall meet at least four times a year and shall report all actions taken by it to the next meeting of the Board of Directors. Two of the members of the Executive Committee shall constitute a quorum of the Executive Committee.

Article VI
OFFICERS

Section 1. Officers and Qualifications. The officers of the Committee shall be the Chairman of the Board of Directors, an Executive Director, a Secretary, a Treasurer, and such other officers as the Board of Directors deems advisable from time to time. Any two offices, except the offices of Executive Director and Treasurer, may be held by the same person.

Section 2. Election. The initial officers shall be elected at the organizational meeting of the Committee; thereafter, all officers shall be elected by the Board of Directors at its annual meeting.

Section 3. Term of Office. All officers shall hold office until their successors have been duly elected and have qualified, or until removed.

Section 4. Removal of Officers. Any officer may be removed either with or without cause by the vote of a majority of the Board of Directors.

Section 5. Duties of Officers. The duties and powers of the officers of the Committee shall be as follows or as shall hereafter be set by resolution of the Board of Directors:

Executive Director

- (A) The Executive Director shall be present at all meetings of the Board of Directors and shall present at each annual meeting of the Directors a report of the activities of the Committee.
- (B) He shall cause to be called regular and special meetings of the Directors in accordance with the requirements of any applicable statute and of these Bylaws.
- (C) He shall appoint, discharge, and fix the compensation of all employees and agents of the Committee other than the duly elected officers, subject to the approval of the Board of Directors.

- (D) He shall sign and execute all contracts in the name of the Committee, and all notes, drafts, or other orders for the payment of money.
- (E) He shall cause all books, reports, statements, and certificates to be properly kept and filed as required by law.
- (F) He shall enforce these Bylaws and perform all the duties incident to the office of Executive Director, and which are required by law, and generally, he shall supervise and control the activities of the Committee.

Secretary

- (A) The Secretary shall keep the minutes of the meetings of the Board of Directors and Voting Members in appropriate books.
- (B) He shall attend to the giving of notice of all the meetings of the Board of Directors.
- (C) He shall be custodian of the records and seal of the Committee and shall attest the signatures of other corporate officers upon, and affix the seal to, all corporate papers when required.
- (D) He shall cause to be kept a book or record containing the names of all persons who are members of the Committee, showing their place of residence and their class and category of membership. He shall cause such book or record to be kept open daily during normal business hours, for inspection, within the limits prescribed by law, by any person

duly authorized to inspect such records. At the request of any person entitled to an inspection thereof, he shall cause to be prepared and made available a current list of the officers and Directors of the Committee and their resident addresses.

- (E) He shall present to the Board of Directors at its meetings all official communications received by him.
- (F) He shall further perform all duties incident to the office of Secretary of the Committee.

Treasurer

- (A) The Treasurer shall have the care and custody of, and be responsible for, all the funds and securities of the Committee, and shall deposit such funds and securities in the name of the Committee in such banks or safe deposit companies as the Board of Directors may designate.
- (B) He may make, sign, and endorse in the name of the Committee all checks, drafts, notes and other orders for the payment of money, and pay out and dispose of such under the direction of the Executive Director or the Board of Directors.
- (C) He shall cause to be kept accurate books of account of all its business and transactions and shall cause to be exhibited books and accounts to any person duly authorized to inspect such records.

- (D) He shall render a report of the condition of the finances of the Committee at each annual meeting of the Board of Directors and at such other times as shall be required of him.
- (E) In the absence of the Secretary, he shall serve as Acting Secretary with authority to attest the signatures of other officers upon, and affix the corporate seal to, corporate papers when required.
- (F) He shall further perform all duties incident to the office of the Treasurer of the Committee.

Other Officers

Other officers shall perform such duties and have such powers as may be assigned to them by the Board of Directors.

Section 6. Vacancies. All vacancies in any office shall be filled promptly by the Board of Directors either at an annual meeting or at a meeting specially called for that purpose.

Section 7. Compensation of Officers. The officers shall receive such salary or compensation as may be fixed by the Board of Directors.

Article VII

CORPORATE SEAL

The Board of Directors shall provide a suitable corporate seal, in such form and bearing such inscription as it may determine.

Article VIII
FISCAL YEAR

The fiscal year of the Committee shall begin on January 1 and end on December 31.

Article IX
MEMBERSHIP CERTIFICATES

Certificates representing classes of membership may be in such form as the Board of Directors may prescribe. No certificate shall be valid unless it is signed by the Chairman, or in his absence the President, and by the Secretary or Acting Secretary, and sealed with the Committee's corporate seal.

Article X
INDEMNIFICATION

The Committee may indemnify and reimburse all persons whom it has the power to indemnify and reimburse, pursuant to Section 29-505(14) of the District of Columbia Nonprofit Corporation Act or any successor statute in the manner and to the fullest extent provided therein, for all expenses actually and necessarily incurred in connection with the defense of any action, suit or proceeding in which he is made a party by reason of having been a director or officer, except with respect to matters as to which such person has been adjudged liable by virtue of negligence or misconduct in the performance of a duty. The Committee may purchase and maintain insurance for this purpose. The indemnification provided for in this Article X shall not be deemed exclusive of any other rights to which those seeking indemnification for any reason whatever may be entitled under any agreement, vote of Voting Members or disinterested Directors, or otherwise.

Article XI
DISSOLUTION

Upon dissolution or final liquidation of the Committee, all assets remaining after application and distribution of assets as required under Section 29-549 of the District of Columbia Non-Profit Corporation Act shall be transferred or conveyed to one or more domestic or foreign corporations, societies, or organizations which have qualified for nonprofit and tax exempt status under Section 501(c)(3) of the Internal Revenue Code, and which are engaged in activities substantially similar to those of the Committee, pursuant to a plan of distribution adopted as provided for in Section 29-550 of the District of Columbia Non-Profit Corporation Act.

Article XIII
AMENDMENT OF BYLAWS

The Bylaws of the Committee may be altered, amended, added to, or repealed by majority vote of the entire Board of Directors as is necessary or appropriate to carry out the purposes of the Committee to the fullest extent permitted by law.

NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
UNAUDITED INCOME STATEMENT
JANUARY 1 - JUNE 30, 1983

INCOME

Membership Dues	\$801,200
TOTAL INCOME	<u>\$801,200</u>

EXPENSES AND SURPLUS

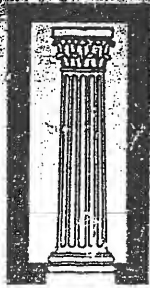
Expenses

% of Expenses

Educational Activities		
Printing educational materials	\$322,910	
Distribution costs	124,607	
Forums, speeches, etc.	<u>725</u>	
Total Educational Activities	\$448,242	65%
 Legislative Activities		
Grass roots lobby activities	\$28,745	
Submit petitions to Congress	47,921	
Direct lobby expenditures	<u>0</u>	
	\$76,666	11%
 Solicitation Costs		
Printing solicitation materials	\$103,575	
Postage	<u>51,915</u>	
Total Solicitation Costs	\$155,490	22%
 Administration		
Office expense	\$ 3,750	
Office supplies	798	
Bank charges	118	
Administrative travel	538	
Legal and accounting	<u>5,650</u>	
Total Administration	\$10,854	2%
<u>Total Expenses</u>	<u>\$691,252</u>	

Surplus

Net Surplus	<u>109,948</u>
(earmarked for future activities)	
TOTAL EXPENSES AND SURPLUS	<u>\$801,200</u>



**NATIONAL COMMITTEE TO PRESERVE
SOCIAL SECURITY AND MEDICARE**

1300 19th Street, N.W., Suite 310, Washington, D.C. 20036

**NATIONAL COMMITTEE TO PRESERVE SOCIAL SECURITY
STATEMENT OF INCOME AND EXPENSES
JANUARY 1 - DECEMBER 31, 1983**

<u>INCOME</u>	<u>Amount</u>	<u>Percent</u>
Membership Dues	<u>\$1,739,635</u>	<u>100%</u>
TOTAL INCOME	<u><u>\$1,739,635</u></u>	<u><u>100%</u></u>
 <u>EXPENSES AND SURPLUS</u>		
Educational Activities	\$992,714	57%
Informational Subject Reports (see list)		
Newsletters		
Forums and Speeches		
Communications with General Public		
Legislative Efforts	\$168,864	10%
Petitions		
Legislative Alerts		
Hill Representation		
Research Projects (see attached list)	\$146,213	8%
Solicitation Costs	\$318,508	18%
Administration	<u>\$98,302</u>	<u>6%</u>
<u>Total Expenses</u>	<u>\$1,724,601</u>	<u>99%</u>
Surplus	<u>15,034</u>	<u>1%</u>
TOTAL EXPENSES AND SURPLUS	<u><u>\$1,739,635</u></u>	<u><u>100%</u></u>

AGREEMENT

THIS AGREEMENT is made effective the 1st day of October 1983, between the National Committee to Preserve Social Security and Medicare ("Committee"), a nonprofit corporation incorporated in the District of Columbia, and Butcher-Forde Consulting, a partnership located in Newport Beach, California ("BFC").

WITNESSETH: That in consideration of the mutual agreements herein set forth, the parties hereto agree as follows:

1. Engagement of BFC. Committee hereby engages BFC to perform the services set out below, and BFC agrees to render such services as an independent contractor under the terms and conditions set forth herein.
2. Term. This Agreement shall continue in force until September 30, 2003, or until sooner terminated by mutual agreement between Committee and BFC.
3. Services to be Rendered by BFC. Subject to the provisions of Paragraph 4 of this Agreement, BFC shall provide the services of consulting, production, management, procurement, and other necessary and related services in connection with all of Committee's activities relating to public relations, direct mail campaigns and solicitations, and media activities (the "BFC Services"). The BFC Services shall include, but are not limited to, writing copy; designing brochures; securing, developing and maintaining mailing lists; printing, labeling and inserting direct mail pieces; and procuring media time and producing the material to be aired thereon.
4. Responsibilities of Committee. Committee shall commence charitable and educational activities devoted to supporting and continuation of the American Social Security and Medicare systems, and shall provide guidance to BFC regarding the coordination of the BFC Services with Committee's activities. Committee agrees to use its best efforts to provide BFC with letter signers and endorsers of stature to assist in the direct mail and media appeals. Committee shall file all reports required by applicable federal, state, and local statutes, governments, agencies, and their regulations. BFC will cooperate with Committee by providing all information

reasonably necessary for Committee to comply with such filing requirements; however, the costs of filing as well as any other legal, accounting or related expenses incurred by any party to this Agreement in connection with such requirements shall be the responsibility of Committee. There will be no service charge by BFC for its cooperation.

5. Limitation Upon Services and Activities. BFC agrees to limit the scope and nature of the BFC Services, and Committee agrees to limit the scope and nature of all its activities, to those services and activities approved for organizations exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code of 1954 as amended, and to the regulations relating to that section as promulgated by the Internal Revenue Service. Specifically, Committee shall not, and BFC in its provision of the BFC Services shall not cause Committee to, participate or intervene in any political campaign (including the publishing or distribution of statements) on behalf of any candidate for public office.

6. Advances for Certain Committee Activities. BFC may, at its sole discretion, advance some or all funds necessary to provide the BFC Services falling within the scope of this Agreement. Such advances may include the costs of computer work, mail lists, printing and other mail house services, postage, media time, media script preparation, legal fees, etc. These advances of cash or credit by BFC shall be reimbursed to BFC out of the receipts of Committee in accordance with Subparagraph 10(a) herein.

7. Compensation. BFC shall receive, as payment for its services, fees to be determined as follows:

- (a) Ten cents (\$0.10) per letter or package for all mailings.
- (b) An administrative and management fee amounting to 15% of the gross amount billed by outside suppliers and independent contractors which have been retained by BFC to provide goods or perform services falling within the scope of this Agreement.

Such goods and services may include, but are not limited to, the following: (i) art, layout, photography, and design; (ii) printing; (iii) mailing lists, computer work, and mailing house services; and (iv) media production and time purchases. Specifically excluded from the administrative and management fee are payments by BFC for postage and for general office overhead, including rent, payroll, etc. If BFC elects, at its sole discretion, to produce in-house certain goods and services which, if subcontracted outside, would be subject to the administrative and management fee, then BFC shall charge Committee a reasonable and mutually-agreed upon charge for such goods and services, but shall not receive any administrative and management fees thereby.

8. Expenses. BFC or its designated subcontractors and suppliers shall be reimbursed by Committee for all reasonable expenses incurred in connection with the provision of the BFC Services under this Agreement. BFC shall provide Committee periodic statements itemizing all expenses. Reimbursement shall be made upon the presentation of any invoice, receipt or other document evidencing an expenditure or accrual of such obligation.

9. Limitation of Liability. BFC agrees that it will look solely to the assets of Committee for the payment of its fees and expenses, and that no director, officer, employee, member, or other individual associated with Committee shall have any personal liability in connection with any services performed or expenses incurred under this Agreement. BFC agrees to make such Limitation of liability known to its subcontractors and suppliers whenever necessary to implement the provisions of this Paragraph 9.

10. Manner of Payment. With the approval of BFC, Committee shall appoint an accountant to establish an account or accounts in the name of Committee with appropriate financial institutions. The accountant shall keep a record of all funds

received by Committee from any source, and shall make regular reports to BFC. Copies of all correspondence and data prepared by said financial institutions for Committee shall be delivered to BFC.

The accountant shall make payments for such accounts according to the following priorities:

- (a) Reimbursement to BFC for all advances and expenses, as described in Paragraphs 6 and 8 herein.
- (b) Payment to outside suppliers and independent contractors who have provided goods or rendered services in connection with this Agreement. Such payment shall include the administrative and management fee established by Subparagraph 7(b) herein.
- (c) Payment to BFC of its compensation as set forth in Subparagraph 7(a) herein.
- (d) Expenses incurred by Committee in connection with other legitimate activities unrelated to the provisions of this Agreement.

No more than 90 days after the termination of this Agreement, BFC shall prepare its final statement for payment and reimbursement, and upon payment thereof any funds remaining in the account may be used by Committee without restriction.

11. Elimination of Deficit. Should this Agreement be terminated with monies still due and owing BFC or its outside suppliers and contractors, then BFC shall have the right to solicit on behalf of Committee, by direct mail or otherwise, names appearing on the list of donors until that debt has been paid. Such solicitation shall be at the sole expense of BFC. All the terms of this Paragraph 11 shall remain in full force

and effect both during the continuation of the BFC Services for Committee and for five years thereafter upon the termination of this Agreement for any reason.

12. Ownership of Lists. All names, addresses, and other identifying information relating to persons, firms, organizations, or corporation which are obtained, developed, compiled or otherwise acquired for Committee by or through the efforts of BFC in connection with the BFC Services shall at all times be the joint property of Committee and BFC. These names and addresses may be used at any time by Committee or BFC in any manner, and for any purpose without charge to the other party; provided, however, that Committee may not sell, lease, transfer or otherwise convey said lists nor make their contents known to any third party without the written consent of BFC.

13. Ownership of Work Product. All concepts, ideas, materials, computer software, media scripts, text, etc., developed by or prepared for BFC on behalf of Committee shall be the sole property of BFC, and may be used in any manner by BFC without charge or obligation to Committee.

14. Exclusive Nature of Agreement. Committee recognizes that BFC will incur substantial costs in complying with this Agreement, and the BFC will devote significant staff and other resources in reliance thereof. Committee therefore agrees that so long as this Agreement is in effect Committee shall not employ, directly or indirectly, within the United States of America, the services of any other person or organization for the purpose of providing any of the services relating to public relations, direct mail, or mass media which are set forth in Paragraph 3.

15. Miscellaneous Provisions.

(a) Notice. All notices and reports relating to this Agreement shall be in writing and shall be sent by certified mail, postage prepaid, return receipt requested, addressed as follows:

If to Committee:

James Roosevelt
120 Newport Center Drive
Suite 200,
Newport Beach, California 92660

If to BFC:

Butcher-Forde Consulting
840 Newport Center Drive
Suite 550
Newport Beach, California 92660

Time periods shall commence upon the date of mailing of notice. Any notice which is required to be given within a stated period of time shall be considered timely if postmarked before midnight of the last day of such period.

(b) Merger. This Agreement sets forth all of the promises, agreements, conditions, and understandings among the parties. No other agreements, oral or otherwise, shall be deemed to exist or bind any of the parties, and all prior agreements are superseded.

(c) Governing Law. This Agreement shall be governed by the laws of the State of California both as to interpretation and performance.

(d) Burden and Benefit. This Agreement is binding upon, and inures to the benefit of, the parties hereto and their successors and assigns.

(e) Severability of Provisions. The provisions of this Agreement are severable, and should any of its provisions, clauses, or portions thereof be deemed invalid and of no force and effect, then only that provision, clause, or portion thereof shall fail and the remainder of this Agreement shall be in full force and effect.

IN WITNESS WHEREOF, the parties hereto, by their respective and duly authorized officers, have hereunto set their names and seals, as of the date above, at Newport Beach, California.

NATIONAL COMMITTEE TO PRESERVE SOCIAL
SECURITY AND MEDICARE

Corporate Seal

BY _____
James Roosevelt, Chairman

Dated: _____

Witness:

BUTCHER-FORDE CONSULTING

By _____
William A. Butcher, President,
William A. Butcher Inc.,
a partner of Butcher-Forde Consulting

Dated: _____

LAW OFFICES
WILLIAM WEWER

1300 19TH STREET, NW, SUITE 310
WASHINGTON, D. C. 20036
TELEPHONE (202) 822-0385
TELECOPIER (202) 822-0387
CABLE WEWER-DC

840 NEWPORT CENTER DRIVE, SUITE 550
NEWPORT BEACH, CALIFORNIA 92660
TELEPHONE (714) 840-6110
TELECOPIER (714) 780-2639
CABLE WEWER-NB

Washington, D. C.

April 20, 1984

Mr. J. E. Griffith
Chief, Exempt Organizations
Rulings Branch
Internal Revenue Service
Department of the Treasury
Washington, D. C. 20224

RECEIVED
EXEMPT ORGANIZATIONS
TECHNICAL BRANCH

APR 23 1984

RULINGS SECTION I

Re: National Committee to Preserve Social Security and Medicare
OP: E: EO: R: 4

Dear Mr. Griffith:

I am general counsel and a director of the National Committee to Preserve Social Security and Medicare ("Applicant"), a non-profit organization which has applied for recognition of exemption under Section 501(c)(3) of the Internal Revenue Code. I am replying to your letter dated March 30, 1984, in which you request additional information.

As I recently discussed by telephone with Mr. Smith of your office, Applicant has not commenced operations, and will not do so until it receives its determination letter. However, as set out in Applicant's application on Form 1023, an organization affiliated with Applicant, the National Committee to Preserve Social Security ("National Committee"), has been engaging in activities some of which are substantially identical to those which Applicant will commence upon receipt of the determination letter. Therefore, wherever it seems appropriate, I will respond to your questions with a description of the actual activities engaged in by the National Committee. Also, for ease of review I will quote each question before submitting my answer.

1. Please describe, in detail, and provide copies of any agreements you may have with your members, trustees, directors, officers, or their blood relatives for the provision of services or supplies.

Mr. J. E. Griffith
April 20, 1984
Page 2

Applicant has no agreements with its directors, etc. for the provision of services or supplies. However, National Committee has several such agreements, as described below:

National Committee has engaged its director William Wewer as counsel for the provision of routine legal services on an hourly basis. Mr. Wewer's hourly rate is \$150. There is no written contract. National Committee uses other lawyers not associated with Mr. Wewer.

National Committee uses the services of International Policy Studies Organization, Inc. ("IPSO"), for the provision of research and writing services. Director Kathleen Marquardt is a director and officer of IPSO. IPSO hires researchers and writers on a contract basis at an hourly rate and passes on this rate dollar for dollar to the National Committee. Normally the hourly rate ranges from \$10 to \$15 per hour. In addition, IPSO is paid a monthly retainer by the National Committee amounting to \$4,000. National Committee uses other research and writing organizations not associated with IPSO.

National Committee uses the services of Kelly Consultants for its caging and bookkeeping operations. Kelly Consultants is a corporation partially owned by National Committee's assistant treasurer Blanche Kelly. Kelly Consultants is paid between 17.5 and 25 cents for each response letter processed. Ms. Kelly is an officer of the National Committee only because she has been authorized to sign checks as part of her bookkeeping function.

2. Please indicate whether the facility in which your organization is housed, is owned or leased from a member, trustee, director, officer or their blood relatives. If so, please submit copies of any agreements entered into.

Because Applicant has been inactive, it has not required office space and will not require any until it commences its operations following receipt of your determination letter. At that time it expects to share office space with the National Committee and will pay an attributable share of the rent.

Mr. J. E. Griffith
April 20, 1984
Page 3

National Committee operates out of offices subleased from the law firm Brown, Roady, Bonvillian & Gold, Chartered. No member or employee of this law firm is an officer, director or trustee of the National Committee. National Committee does not know if any member of the lessor's law firm is a member of National Committee, but doubts it.

3. Does your organization share office space or any other facilities with the "National Committee"? If so, are you required to pay any rental fee? See answer to Questions 2.
4. Does your organization coordinate any fund raising activities with the "National Committee"? If so, please specify what activities and how funds are apportioned and on what basis.

Applicant has not engaged in any fund raising activities to date. When it commences fund raising activities, they will be kept separate from those of the National Committee in order to avoid contributions to an organization exempt under Section 501(c)(3) being diverted inadvertently to an organization exempt under Section 501(c)(4).

5. Please indicate whether any members of your governing body or staff receive any remuneration for services rendered to the "National Committee". If so, please indicate the amount of compensation received by any such individuals.

Please see answer to question No. 1. Applicant has no staff. When Applicant becomes active, it will take steps to assure that no member of its governing body or staff receives compensation from Applicant for services rendered to the National Committee. Applicant is aware that such payments would constitute an improper diversion of funds from a (c)(3) organization to a (c)(4) organization.

6. You indicate in your bylaws the intent to promote charitable goals. Please describe, in detail, what charitable goals (not including the defense of human and civil rights or defense of America's Social Security and Medicare systems) you plan to promote.

Mr. J. E. Griffith
April 20, 1984
Page 4

Applicant will promote the same goals now promoted by National Committee. Since its inception, the National Committee has engaged in a wide variety of research and educational activities with respect to social issues that are of concern to America's senior citizens. The subjects of that research illustrate the charitable goals of that organization. Enclosed is a list of projects and accomplishments of the National Committee. Applicant directs your attention particularly to the research projects set out on Page 3. Several of these projects currently are being printed and will be distributed free of charge to the general public. Draft copies are enclosed.

National Committee's research involves many different issues relating to senior citizens, with particular emphasis upon health care delivery and the place of the senior citizen in today's society. For example, National Committee's project on home health care as an alternative to nursing homes considers (1) the dollar cost of providing medical care at home compared to the cost of building nursing homes, and (2) the public policy benefits of treating senior citizens in one environment or the other. This is the first in a series of reports on long-term health care for seniors.

The National Committee is looking closely at the social problems caused by the increasing age of our population, and is attempting today to plan alternative measures to deal with the projected vast increase of the geriatric population expected to occur by the end of this century. Its research project on self-efficient communities for the handicapped deals with the social problems faced by America's citizens as the average age of our population increases.

Another research project reflects the interest of National Committee in having senior citizens contribute to society. The project on child care in nursing homes looks at the public policy benefits of using senior citizens to run child care centers which make it possible for younger couples to work.

Upon determination of its tax-exempt status, Applicant expects to assume most of the goals and research projects of the National Committee, and will pursue an aggressive research campaign devoted to identifying and proposing solutions to major societal problems faced by the United States and other western countries as their population gradually ages.

Mr. J. E. Griffith
April 20, 1984
Page 5

7. You indicate in your Bylaws the intent to educate the public on the importance of America's Social Security and Medicare systems, and other subjects useful to the individual and beneficial to the community. Please identify the other subjects which will be the objects of your educational effort.

As described in Applicant's answer to Question 6, National Committee (and Applicant, once it becomes operational) engages in substantial research with respect to a number of issues of concern to senior citizens. As those research projects are produced in printed form, National Committee makes them available to the general public, the press, and other opinion makers nationwide. Other aspects of its educational activities are set out in Part I of the list of projects and accomplishments.

National Committee publishes a series of one-sheet informational subject reports which provide information to the general public on health, aging, and related issues. These are distributed to the general public without regard to membership status. National Committee's newsletter is sent to members, federal legislators, and the press. National Committee also replies to the 500 to 1,000 letters it receives each day without regard to the membership status of the writer.

National Committee is preparing a half-hour television program dealing with the problems of Social Security and Medicare. It will make this program available free of charge to television stations all over the country. National Committee is preparing a series of public service columns and radio announcements to be placed in small newspapers nationwide and delivered by telephone feeder to radio stations all over the country. These public service announcements will deal with all of the issues currently being researched by the National Committee. Other aspects of National Committee's research program are set out on Page 2 of the list of projects and accomplishments. As indicated in Applicant's Form 1023, Applicant expects to assume most of the educational activities now carried on by the National Committee upon receipt of its determination letter.

National Committee also engages in an aggressive legislative program involving both direct and grass roots lobbying. Applicant will not engage in any lobbying

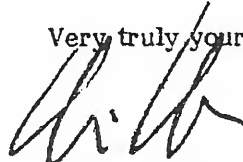
Mr. J. E. Griffith
April 20, 1984
Page 6

exceeding the limits imposed by Section 501(h), and, if attribution rules so require, National Committee will curtail its legislative activities so the combined lobby expenditures are in line with IRC statutes and regulations.

To further assist you in your determination of Applicant's tax status, I enclose a copy of National Committee's unaudited statement of income and expenses for 1983.

Applicant respectfully acknowledges the assistance provided it by Mr. Smith and Mr. Downs of your office in recent telephone conversations. I trust that this information and the enclosures will be adequate for you to complete your review of Applicant's Form 1023 and issue a determination letter granting tax exemption under Section 501(c)(3). Applicant respectfully requests that before any negative determination is made, the district director hold an oral hearing on this application. Please direct all future correspondence to me at my new offices located at 1300 19th Street, N.W., Suite 310, Washington, D. C. 20036.

Very truly yours,



William Wewer
General Counsel to Applicant
National Committee to Preserve
Social Security and Medicare

WW/nh
Enclosures

LAW OFFICES
WILLIAM WEWER

1910 S STREET, N.W.
WASHINGTON, D. C. 20009
TELEPHONE (202) 232-3170
TELECOPIER (202) 232-3180
CABLE WEWER-DC

840 NEWPORT CENTER DRIVE, SUITE 350
NEWPORT BEACH, CALIFORNIA 92660
TELEPHONE (714) 640-6116
TELECOPIER (714) 760-2610
CABLE WEWER-NB

Washington, D.C.
October 20, 1983

RECEIVED
District Director of Internal Revenue

OCT 27 1983

CENTRALIZED SERVICES
BALTIMORE

Internal Revenue Service
EP/EO Division
P.O. Box 538
Baltimore, Maryland 21203

Re: National Committee to Preserve Social Security
and Medicare

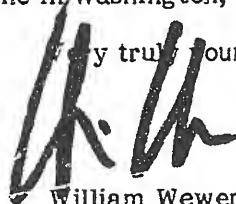
Gentlemen:

Enclosed is an application for recognition of exemption under Section 501(c)(3) of the Internal Revenue Code (Form 1023) on behalf of National Committee to Preserve Social Security and Medicare, a District of Columbia nonprofit corporation. Upon receipt of a favorable determination, Applicant intends to assume the activities of an affiliated nonprofit organization, as described more fully in the enclosed materials. The affiliated organization does not wish to expend substantial sums before that transfer occurs; therefore, Applicant respectfully requests expedited treatment of this exemption application.

Also enclosed with this application are the following attachments: Articles of Incorporation, conformed copy of Bylaws, Form SS4, examples of solicitations made by affiliated organization, examples of educational materials prepared by affiliated organization, biography of Applicant's Chairman, financial statements of the affiliated organization.

As indicated above, Applicant requests expedited treatment of this application for exemption. Applicant requests that, before any negative determination is made, the District Director hold an oral hearing on this application. If I may provide any additional information, please contact me by telephone in Washington, D.C.

Very truly yours,



William Wewer

WW:jlh
Enclosure